Exova	Quality	**E-E-QU-FT-CS-WR-SOP-101**
Overall Procedure Review		

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1. GOVERNING STANDARDS

1.1. ISO 9001: 2008

2. INTRODUCTION

Operating Procedures are issued to assist staff in ensuring that the requirements of the relevant standards are followed correctly in the relevant division. If there is any conflict between this Operating Procedure and the relevant standard the requirements of the standard take precedence.

2.1 RESPONSIBILITY

The General Manager of the Consultancy Division is responsible for ensuring that the requirements of this Operating Procedure are followed.

All staff conducting tasks to the standards referenced in this Operating Procedure have a responsibility to ensure that the requirements specified in this Operating Procedure are followed and that any changes to the specified conditions or any inaccuracies in the Procedure are reported to the HSEQ Manager, that is responsible for the division.

3. HEALTH & SAFETY

The Health and Safety training required by the staff is as follows: N/A

4. OVERVIEW OF THE PROJECT PHASES

The key project phases are shown schematically in Figure 1 together with the code identifier for the relevant procedures. General Project Flow chart (Figure 2) in Appendix A provides a more detailed breakdown of the project process.

Quoting procedure
E-E-QU-FT-CS-WR-SOP-200 +

Contract Review Procedure
E-E-QU-FT-CS-WR-SOP-300+

Project initiation procedures
E-E-QU-FT-CS-WR-SOP-400+

Main project phase
E-E-QU-FT-CS-WR-SOP-500+

Project Completion Procedure
E-E-QU-FT-CS-WR-SOP-600+
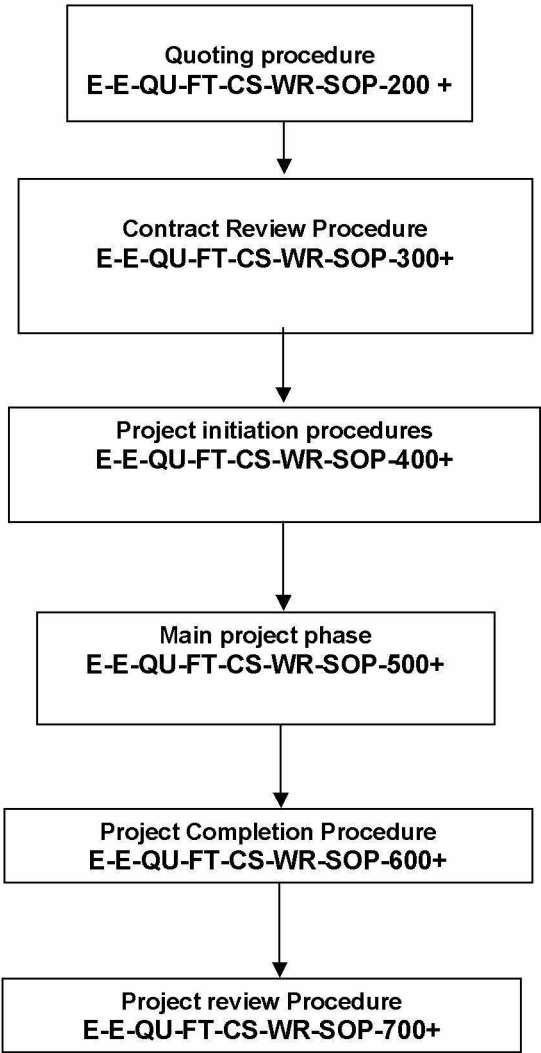
Project review Procedure
E-E-QU-FT-CS-WR-SOP-700+

Figure 1: Schematic of Project Flow Chart

5. QUOTING

The quoting stage is arguably the most critical phase of a project. It is at this stage that a clear understanding of a client's needs must be obtained. The scope of works has to be estimated and stated accurately and the project priced taking into a range of factors such as project risk, available resources, type of work, market rates etc. Potential high risk clients need to be identified and appropriate measures put in place. Terms and conditions need to be specified or agreed that are fair to the client but do not expose Exova to unnecessary risk.

The quoting stage has a major influence on the proportion of successful quotes, the profits or loss made, the expectations of the client and whether these are subsequently satisfied.

It should also be noted that the quoting phase may be the initial contact a new client has with the organisation which may affect future relationships.

EXOVA procedure E-E-QU-FT-CS-WR-SOP-**201** relates to general consultancy and incorporates a risk assessment approach.

6. CONTRACT REVIEW

EXOVA procedure E-E-QU-FT-CS-WR-SOP-**301** defines procedures to check written acceptance of a proposal has been obtained before work is undertaken and, if relevant, whether prepayment of fees has been received. Procedures are also in place for the review of alternate terms and conditions if required. It is important that formal acceptance of our fees has been received from the client prior to work commencing to minimise the risk of non-payment or attempts to impose excessively onerous terms and conditions by withholding fees.

7. PROJECT INITIATION

EXOVA procedure E-E-QU-FT-CS-WR-SOP-**401** defines the procedures for project initiation which comprises the allocation of a Project Manager and other resources, programming the project delivery and entering details correctly on the Central Time Database and project listings.

8. MAIN PROJECT PHASE

EXOVA undertakes a diverse range of project types. The most appropriate main phase procedure should be selected from the following list. If no clear match is found the General Main Phase Procedure should be adopted which requires a specific project plan to be developed.

Each procedure may be supplemented by:

- **Supplementary Procedures** which provide greater detail on processes to be followed
- **Flow charts / Check lists** which provide a visual representation of processes to be followed and / or provide a means for checking all processes have been followed.
- **Standard Templates** which define standardised formats and contents for reports and other project related documents to ensure a consisted corporate style is maintained.
- **Example Listings** which identify reports and documents from other projects which are considered to represent good practice and/or incorporate innovative or typical solutions to common problems which can be used as worked examples for reference. It should however be noted that it is not appropriate to simply cut and paste older reports since they will have to be upgraded to current formats and address improvements to industry and EXOVA practices, legislative changes and the specific needs of the current project. Care should be taken to ensure any references to the original project are not carried over.
- **Guidelines** which provide advice and background information on how to approach specific projects
- **Primary Reference Listings** which identify key references that must be followed where appropriate for a particular project. These will include applicable legislation for Fire Engineering Design Projects and test standards for testing projects
- **Secondary Reference Listings** which identify common references and provides comments on their suitability for general application.
- **Calculation Sheet / Standard Solution Listings** which identify documents and other resources such as pre-checked spreadsheets that can be used when undertaking projects.
- **Approved Technical Software Listings** which identifies software that is commonly used when undertaking projects

- **Internal Research report listing** that can be referenced with appropriate authorisation from an EXOVA company General Manager. These documents are generally EXOVA intellectual property and must not be released to any third party, or copied without permission from an EXOVA General Manager, if appropriate.

EXOVA procedure E-E-QU-FT-CS-WR-SOP-501 describes the Main Works procedure. All remaining procedures in this group are specific assessment procedures.

9. PROJECT CLOSURE

EXOVA procedure E-E-QU-FT-CS-WR-SOP-601 describes the project closure process which requires
- a check that all elements of the project to have been completed satisfactorily
- a check that all time and other costs have been posted via the timesheet/job costing system
- a check that the project has been fully invoiced including disbursements
- all relevant electronic files to be in the placed in the correct folders
- all hard copies of the files to be appropriately filed

10. PROJECT REVIEW

EXOVA procedure E-E-QU-FT-CS-WR-SOP-701 requires a review or audit of the project to check that it has been carried out in accordance with the project brief in a timely manner and relevant internal processes have been followed.
In addition a comparison of time and other costs versus the invoiced amounts will be undertaken and appropriate notes made on management reports. This is important feedback so that future quotes can be modified for similar work or more efficient ways of undertaking similar projects identified.
If considered appropriate the views on the performance of EXOVA may be sought from clients and other stakeholders involved in a project and /or recommendations or suggestions for further work provided.
Finally the project should be marked as closed / complete on the central time database and individual project listings.

11. ADMINISTRATIVE PROCEDURES

EXOVA procedures E-E-QU-FT-CS-WR-SOP-800+ describe various administrative procedures. The forms and the templates relating to administrative procedures and reports are numbered E-E-QU-FT-CS-WR-SOP-1000+.

12. NON-CONFORMING ACTIVITIES

Refer to **SP06 and SP07**.

13. TRAINING

No unauthorised personnel shall be allowed to conduct procedures without prior training or supervision.

- END OF TEXT -

Revision History
Revised following stage 1 application for ISO 9001.

Appendix A

PROJECT FLOW CHART

Quoting Procedure

Enquiry received

Enter 'opportunity' in CRM
Set up job in Synergist (stage "Quote")
Create fee proposal and submit to client

Modify & re-issue quotation
Update information on CRM & Synergist

Changes to fee proposal requested

Seek reason
Enter information in CRM
In Synergist, Change state to "Lost"

No decision made

Feedback from client

Client approves fee proposal?

NO

Unsuccessful

YES

Contract Review procedures

Client response includes:
a) Approval of fee proposal
b) Full invoicing details

Update stage and status of job in Synergist and CRM

NO

YES

Contact client to request formal approval and invoicing details

Contact client to confirm invoicing details.
Send project acknowledgement letter including scope of works
Carry out credit check procedure if necessary.

Project initiation procedures

Project manager appointed.
Update stage and status of job in Synergist and CRM

Review contract and job programme.
Ensure adequate resource allocation

Main Project procedures

Have all aspects of the scope of works been completed?

Carry out work as detailed in project procedures
Procedures for changes to scope of works or to contract arrangements are described in the detailed project procedures

NO

YES

Project Completion procedures

Update stage and status of job in Synergist and CRM

Project Review procedures

Check original fee proposal and scope of works

Compare actual costs against estimated costs
Review with management

END